Send a Referral by Direct Message

Kareo Clinical provides improved care coordination with the ability to send patient referrals through secure electronic Direct Message, by eFax, or by downloading and printing the file. Each patient referral includes a Transition Of Care (TOC) and the option to attach an encounter note. Your referral history can be viewed in Referrals under the Clinical icon.

Important Notes:

- Direct Message is a secure electronic messaging system that enables transmission of protected health information (PHI) to other authenticated providers. Upon initiating the first referral, you will be prompted to set up Direct Message and authentication with Updox.
- A provider must be part of the DirectTrust network to send or receive a referral via Direct Message.
- For Meaningful Use: When a referral comes back, mark it as received in Referrals as part of your CQM measures.
- Starting 2019 UpDox will disable support of the SSL and TLS 1.0 protocols, which may cause some users to see an error message when accessing UpDox from Kareo. Follow the steps in their status blog to verify your operating system and browsers are up to date.

Navigate to Patient Chart / Notes

1. Enter the first 2–3 letters of the patient's name in the top navigation search box.
2. Click to select the patient from the auto-populated results. The patient's record opens to the Face Sheet.
3. Click Notes on the left menu. The Notes page opens.
4. Click View on the right of the appropriate signed note. The note opens.
Send Referral by Direct Message

If this is your first time sending a referral via Direct Message, you will be prompted to complete a brief set-up process with Updox.

1. Click the appropriate ToC checkbox in the bottom task bar of the note. Select "Receiving" if the patient has been referred to you and you are sharing patient progress with the referring provider, or "Transferring" if you are referring the patient to another provider.

2. Click Send Referral By at the bottom of the note and select Direct Message from the drop-down menu. The Send a Referral for (patient name) window opens.

3. Click the "Encounter Note" checkbox to include the encounter note with the referral (optional).

4. By default, all items are pre-selected in the Summary of Care. Click to uncheck the boxes of items you do not wish to include in the referral summary.

5. Click Send Message. The Direct Message window opens.

6. To send the referral to a provider in your address book, begin typing the provider’s email address in the To: field and select it from the auto-populated results.

7. Alternatively, click Find in Directory to search for a provider’s email that is not in your address book.

   Note: If you do not know the recipient provider’s secure direct messaging email address, you will need to contact them to obtain it.

https://helpme.kareo.com/Clinical/Referrals/Send_a_Referral_by_Direct_Message

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8. When the email address is entered, click anywhere in the window outside of the To: field. The Verifying Address confirmation message displays.

9. A green confirmation displays below the email address when it has been verified. 
   *Note:* An Invalid Direct Address message displays on the right of the email address if it's unverifiable.

10. Review and modify the information in the Subject and Message fields, if desired.

11. Selected checkbox items from the previous window display as Attachments.

12. Click Send.

A Successfully Sent confirmation message displays in green at the top of the next window. A copy of the attachments is saved in the practice’s and patient’s Documents.